



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone was steady to fully steady on frozen 8-16 lb. hens and 16-24 lb. toms. Inquiry light to moderate, instances good. Offerings mixed. Processor bought a light volume of hens and toms that are co-packed that are private label, basted, netted with a timer for 60 cents. Parts and meats trading was light. Demand moderate to good. Buyers remain cautious and selective.



EXPORT MARKET HIGHLIGHTS

Trading light with most interest for tom drums and thigh meat. Demand moderate to good, best for Russia. Many export buyers price conscious and unwilling to meet current offering levels. Supplies tight to instances adequate.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **AUGUST 28, 2003**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	FORWARD SHIPMENTS 6/ WTD AVG	VOLUME (000)	DEL. PER	OPEN COMMITMENTS 7/ VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	58-60	59	59.00	80	-	-	-	-	-
CENTRAL REGION 4/	57-60.5	57.5-58.5	58.00	40	-	-	-	-	-
WESTERN REGION 5/	58-60	-	-	-	-	-	-	200	SEP
16-24 LB TOMS									
EASTERN REGION 3/	58-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	57-58.5	-	-	-	-	-	-	-	-
WESTERN REGION 5/	57-58	-	-	-	-	-	-	160	SEP

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **AUGUST 29, 2003**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	FORWARD SHIPMENTS 6/ WTD AVG	VOLUME (000)	DEL. PER	OPEN COMMITMENTS 7/ VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	58-60	-	-	-	62.00	480	OCT	-	-
CENTRAL REGION 4/	57-60.5	-	-	-	-	-	-	-	-
WESTERN REGION 5/	58-60	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	58-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	57-58.5	-	-	-	-	-	-	-	-
WESTERN REGION 5/	57-58	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF AUGUST 29, 2003	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO	MONTH OF AUGUST	CURRENT MONTH	LAST MONTH	SAME MONTH YEAR AGO
8-16 LB HENS				8-16 LB HENS			
EASTERN REGION	59.00	57.40 **	66.00	EASTERN REGION	57.74	58.18	66.56
CENTRAL REGION	59.67	55.50	65.39	CENTRAL REGION	56.89	56.70	66.01
WESTERN REGION	59.00 **	60.00	66.60 **	WESTERN REGION	58.88	59.73	66.32
16-24 LB TOMS				16-24 LB TOMS			
EASTERN REGION	59.00	56.90 **	58.00	EASTERN REGION	57.05	57.32	59.82
CENTRAL REGION	60.00	55.85 **	57.33	CENTRAL REGION	56.25	56.20	59.25
WESTERN REGION	57.50 **	57.50 **	58.70 **	WESTERN REGION	57.40	57.64	59.82

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	65-66
FROZEN TURKEYS Y TOMS 14-24#	63-65
FROZEN TURKEYS Y TOMS 24-28#	65-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

**FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 01-SEP-2003**

	(8-16#)	(16-24#)	
	<u>HENS</u>	<u>LBS TOMS</u>	<u>LBS</u>
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE (000)</u>
SALES (PROMOTIONS INCLUDED)	64.86	7	64.00 2
SALES (PROMOTIONS NOT INCLUDED)	64.86	7	64.00 2
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)		10	5

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS**

JULY	470,706*
AUGUST 1-23, 2003	328,650*
To date 2003	3,791,978*
To date 2002	3,337,972*

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 23-Aug-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

			YOUNG TURKEYS		TOTAL TURKEYS		
			PCT	AVG	OLD		AVG
			CHG	LIVE	BANDED		LIVE
-THOUSAND HEAD-			PW	WT	-THOUSAND HEAD-		WT
N EAST			2	21.52	(A)	885	21.52
SATL			1	28.48	(A)	822	28.48
N CENT			3	29.37	(A)	2,243	29.37
S CENT			0	19.65	(A)	476	19.65
WEST			7	22.29	(A)	507	22.29
U.S. TOTAL			2	26.15	15	4,933	26.15
TO-DATE							
2003			157,265(B)		485	157,750	
TO-DATE							
2002			156,120(B)		267	156,387	

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 69,000; for the year 2,111,000; last year to date 1,679,000.

LIVE TURKEYS SLAUGHTERED

W/E 23-Aug-2003

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		
	<u>THOUSANDS</u>				
HEAD	2,088	2,761	69	15	4,933
AVG WT	15.41	34.37	22.73	24.19	26.15
LAST WEEK	2,075	2,675	56	8	4,814
SAME WK YR AGO	2,174	2,919	64	13	5,170
AVG WT	15.41	34.25	24.45	26.68	26.19
TO-DATE/2003	63,076	92,078	2,111	485	157,750
TO-DATE/2002	62,296	92,145	1,679	267	156,387

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 AUGUST 2003.

The undertone on fresh tom breast meat and fresh destrapped tenderloins was steady to firm. Demand was fair to good with trading noted at higher price levels for post-holiday needs as processors restart plants from the long holiday weekend. Offerings light to adequate and held with confidence. Increased confidence was noted on frozen tom breast meat into export channels. Institutional breast trading was noted at steady to higher prices. The undertone on tom bulk parts was steady to firm on drums and wings, necks steady. The undertone on hen bulk parts was steady to firm with 2-joint wings strongest. Demand fair. Offerings of hen 2-joints and necks were short of buyers' needs. Trading centered on a heavy volume of plant grade 4-8 lb. breasts for September shipments, balance light. Non-basted rib breasts: Grade A 12-16 lb. 85, plant grade 12-16 lb. 75-78 cents delivered domestic. For export: tom necks 16, frozen thigh meat 79 delivered October, frozen tom breast meat 113-115 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	82.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	153.00	21
BREASTS, 4-8 LBS PLANT GRADE 2/	77.00		77.00	600
DRUMSTICKS, TOM	31.00		31.00	86
DRUMSTICKS, TOM—FRESH		F	30.00	40
DRUMSTICKS, HEN				
WINGS, FULL-CUT, TOM	24.50-25.00		24.60	100
WINGS, FULL-CUT, HEN	24.00		24.00	40
WINGS, V-TYPE, TOM	35.00		35.00	20
WINGS, V-TYPE, HEN	62.00		62.00	20
NECKS, TOM	18.00		18.00	15
NECKS, HEN				
BREASTS, B/S, TOM 3/		M	118.00	40
BREASTS, B/S, TOM—FRESH 3/	155.00-162.00		156.27	440
THIGH MEAT		M	70.00	80
THIGH MEAT—FRESH	70.00		70.00	20
BREAST TRIM MEAT				
SCAPULA MEAT				
TENDERLOINS		W	98.00	16
DESTRAPPED TENDERS		W	90.00	80
DESTRAPPED TENDERS—FRESH	123.00		123.00	20
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED—FRESH 4/	21.00		21.00	40

EXPORT TRADING

DRUMSTICKS, TOMS	30.00-31.50		30.50	120
WINGS FULL-CUT - TOMS		W	25.00	40
WINGS, V-TYPE, TOM		W	26.00	54
TAILS				
MECHANICALLY SEPARATED 4/	18.00		18.00	80
THIGH MEAT - FROZEN	70.00-74.00		72.00	160

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 29 AUGUST 2003.

The trade sentiment on fresh tom breast meat and fresh destrapped tenderloins was steady to firm, balance of fresh white meat steady to fully steady. Demand fair to good. Offerings tight to adequate and generally held with confidence. The undertone on frozen white meat was steady with increased confidence noted. Demand light for the mixed availability of supplies. Some processors were utilizing increased amounts of frozen breast meat internally due to the strong fresh market. The trade sentiment on tom bulk parts was steady to firm on drums and wings, necks steady. Demand fair for the limited supplies of drums and wings. Tom neck demand was light to fair for the adequate supplies. Trading centered on a fair volume of fresh tom breast meat delivered domestic, balance slow. For domestic: frozen mechanically separated turkey -90 days age 11-14.50 delivered pet foods, fresh wing meat 45 cents delivered. For export: fresh tom drums 32, scapula 51 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	
					WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		T	82.00	40	82.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	153.00	21	153.00	21
BREASTS, 4-8 LBS PLANT GRADE 2/		R	77.00	600	77.00	600
DRUMSTICKS, TOM	30.00-32.00		30.62	130	30.51	345
DRUMSTICKS, TOM—FRESH	30.00-31.00		30.57	70	30.57	70
DRUMSTICKS, HEN						
WINGS, FULL-CUT, TOM		R	24.60	100	24.44	228
WINGS, FULL-CUT, HEN		R	24.00	40	24.00	40
WINGS, V-TYPE, TOM		R	35.00	20	30.33	60
WINGS, V-TYPE, HEN		R	62.00	20	59.33	60
NECKS, TOM	17.00		17.00	40	17.96	199
NECKS, HEN						
BREASTS, B/S, TOM 3/		M	118.00	40	118.00	40
BREASTS, B/S, TOM—FRESH 3/	155.00-165.00		158.81	278	156.64	864
THIGH MEAT		M	70.00	80	70.00	80
THIGH MEAT—FRESH	70.00-71.00		70.23	62	68.48	122
BREAST TRIM MEAT	68.00		68.00	40	68.00	40
SCAPULA MEAT	58.00		58.00	12	58.00	12
TENDERLOINS		W	98.00	16	98.00	16
DESTRAPPED TENDERS		W	90.00	80	90.00	80
WING MEAT WITH SKIN	45.00		45.00	8	45.00	8
DESTRAPPED TENDERS—FRESH	116.00		116.00	40	119.02	122
MECHANICALLY SEPARATED 4/						
MECHANICALLY SEPARATED—FRESH 4/	17.00		17.00	44	18.48	244
EXPORT TRADING						
DRUMSTICKS, TOMS	32.00		32.00	40	30.76	424
WINGS FULL-CUT - TOMS		W	25.00	40	25.00	40
WINGS, V-TYPE, TOM		W	26.00	54	25.80	262
TAILS						
MECHANICALLY SEPARATED 4/	19.00		19.00	40	22.07	380
THIGH MEAT - FROZEN	73.00		73.00	80	75.95	448

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

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2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.